



Mid-Market Database - MAIN SWITCHBOARD

Please select a module before  
accessing these menus:

Go to Proactive  
Customers Menu

Go to Re-active  
Customers Menu

Go to BMS Targets  
Menu

Browse Mid-Mkt  
Accounts

Go to the Select  
Module Menu

Go to the Print  
Reports Menu

Selected Module:

Bill Data Month/Year:

User:

2/1/1999

#Name?



Exit Application

202

206

208

210

212

200

Figure 2

Mid-Market Database - Proactive Menu

Browse Proactive Customers For Module	G	2/1/1999	#Name?
Browse Proactive Customers-All			
Input Proactive Contacts			
Browse/Edit Proactive Contacts			

Selected Module:	302
Bill Data Month/Year:	304
User:	306

300

Shortcut to Print Reports Menu

316

318

Figure 3

# Browse Proactive Customers Form - For Selected Module

MAN FID	S3VGQ	Select by name:	
local service	\$11,669.72	Select by MAN:	
number of accts	347		
Name assigned to	1ST FRANKLIN		
MAN			
AE assigned to			
Customer			
Customer Contact			
Contact Number			
Remarks			

  

MAN FID	S0427	Select by name:	
local service	\$4,259.16	Select by MAN:	
number of accts	15		
Name assigned to	A.C. WHITE TRANSFER &		
MAN			
AE assigned to			
Customer			
Customer Contact			
Contact Number			
Remarks			

  

MAN FID	S0NG5	Select by name:	
local service	\$8,682.86	Select by MAN:	
number of accts	21		
Name assigned to	A.J. MORRIS &		
MAN			
AE assigned to			
Customer			
Customer Contact			
Contact Number			
Remarks			

406  
408

400

Figure 4

502

### Edit Proactive Customer Data

Customer Data that can be edited:

AE Assigned:	
Customer Contact Name:	
Customer Contact Phone:	
Remarks:	

504

Customer Data that cannot be edited:

Customer Name:	1ST FRANKLIN
MAN FID:	S3VGQ
Module:	C
Total Local Service:	\$11,669.72
Total Number of Accts:	47
Edited by:	VIRGINIA LEWIS
Last Edit:	5/26/1999

User:

#Name?

Selected Module:

C

Input Status:

EDIT DATA



Save Changes

Input Contact for  
Displayed Customer



506

507

508

500

510

512

Figure 5

# Enter Proactive Contacts

SV, MV, OV, SP, MP, OP

Date of Contact

Type of Quality Contact

Remarks:

Click all Products Discussed:

Click all Products "Sold" & Indicate Number of each product:

CLUB  
DAB  
BMS  
RSB  
MTTB  
EDI  
Elec. Billing  
Select

CLUB 0  
DAB 0  
BMS 0  
RSB 0  
MTTB 0  
EDI 0  
Elec. Billing 0  
Select 0

View Quality Contact Guidelines

SV, MV, SP, MP, OP

Select by Assigned Name:

Select by MAN FID:

Customer Data:

Customer Name:

1ST FRANKLIN

MAN FID:

S3VGQ

Total Local Service:

\$11,669.72

Total Number of Accts:

47

Module:

C

AE Assigned:

Customer Contact Name:

Customer Contact Phone:

To make changes to this data, use the Browse Proactive Customers Form

Follow-up Dates:

Follow-up Remarks:

Figure 6

# Browse Mid Mkt Accounts - by Billing Name

bill number 205 221 0585 286  
 cent fid CCO  
 site ALABAMA THRIFT  
 name STORE  
 address P O BOX 821  
 address JASPER AL 35502  
 address  
 man fid S1NA2  
 local service \$121.28  
 input date 3/1/1989  
 input by system  
 Show Accts for Selected MAN  
 Create a Select Referral for this customer

Jump to Name beginning with:  
 Not Alpha

Move Displayed Customer/Account to Reactive Tables  
 Move Displayed Account to BMS Target Table  
 Ensure that the appropriate Module is selected before moving to Reactive or BMS Tables.

bill number 205 214 7355 211  
 cent fid CCO  
 site AL  
 name BHAM TWO WAY  
 address 2425 2ND AV S  
 address BIRMINGHAM AL 35233  
 address  
 man fid S1H33  
 local service \$216.50  
 input date 3/1/1989  
 input by system  
 Show Accts for Selected MAN  
 Create a Select Referral for this customer

Jump to Name beginning with:  
 Not Alpha

Move Displayed Customer/Account to Reactive Tables  
 Move Displayed Account to BMS Target Table  
 Ensure that the appropriate Module is selected before moving to Reactive or BMS Tables.

bill number 205 221 0450 001  
 cent fid CCO  
 site COMPUTER CONNECTIONS  
 name P O BOX 1802  
 address JASPER AL 35502  
 address  
 man fid S784S  
 local service \$76.65  
 input date 3/1/1989  
 input by system

Jump to Name beginning with:  
 Not Alpha

Move Displayed Customer/Account to Reactive Tables  
 Move Displayed Account to BMS Target Table  
 Ensure that the appropriate Module is selected before moving to Reactive or BMS Tables.

Figure 7